Community Supervision

JIMS2 System

Tips and Tricks Training Exercises

Contents

Search Supervision Conditions

#	Goal	Process	Response / Notes
1	Access Search Supervision Conditions.	Click the + sign to the left of Common Supervision > Click the + sign to the left of Supervision Condition > click Search supervision Condition.	**There are 44,190 special conditions in production as of August 20, 2010. This is after less than 8 months of use.**
2	Search Supervision Conditions – View Non-Standard Conditions.	Click Submit to view all non-standard conditions.	
3	Search Condition Literal using keyword search.	Click Refresh > enter Repeat Offenders in the C**ondition Literal** field > click Submit. View the DWI Repeat Offenders condition.	Event types set on conditions are used in non-compliance events.
4	Search by Group 1.	Click the Search Supervision Condition link. Search for conditions using Group 1 Specialized Caseload > click Submit.	
5	Search by condition name using the * wildcard character.	Click the Search Supervision Condition link > Search for conditions using **Condition Name** Report*. Click Submit.	How many conditions are listed in the Search Results? __________ Is Group 1 set to Reporting for all conditions? _________
6	View Supervision Condition	From the Supervision Condition Search Results page, click on the condition name to view details for the condition called **<u>Report Incarceration (Within 48 Hours)</u>**. Click the + sign next to Supervision Condition to view details. Click the + sign next to courts to view the courts for which this condition is valid.	What is Group 1 on this condition? _______________ Are any Court or Department policies associated to this condition? __________

PASO – Search for Conditions

#	Goal	Process	Response / Notes
1	Locate and select a SPN from an officer's caseload. This SPN will be used in Calendaring, Program Referrals, Compliance and Violation Reports.	From Caseload, click Get Supervisor > select a Supervisor > click Get Officers > Select an officer > Click View Caseload > Select a client. Next OV is blank. Last F2F is blank. DOCS > 1 year ago. Case is not an OOC case.	Region: ________________________ Supervisor's Name: ________________________ Officer's name: ________________________ Client Name/SPN: ________________________ **You will use this SPN to complete additional exercises.**
2	Update an active order.	Click the blue Process Orders tab > enter the SPN > click Submit. Select the active order > click **Update Order**. Set the order version to amended > enter Summary of Changes (amend order) > click Add/Remove Conditions.	
3	Search by Condition Name .	From the Add/Remove Conditions page, search for the condition using the **Condition Name** REPORT TO COURT - UPON RELEASE FROM NEW CHOICES. Enter as much of the condition name as will fit in the field. Click Submit.	Note no responses found.
4	Search by Condition Name using * wildcard character.	Click Refresh > enter Report to Court* in the Condition Name field. Click Submit. Locate the condition called Report to Court – Upon Release from New Choices.	Note search results when * wildcard character is added to the search criteria. How many conditions were returned in search results? ____________

5	Search by Condition Literal.	Using the **Condition Literal** field, search for the condition REPORT TO COURT - UPON RELEASE FROM NEW CHOICES. Enter **New Choices** in the Condition Literal field then click Submit.	
6	Search using a keyword.	Use a wildcard character search to locate conditions that contain SAFPF in the condition literal. Enter **SAFPF** in the Condition Literal field > click Submit. Select an SAFPF condition to add to the order.	Which Group 1 values are associated to the listed conditions? ______________________ ______________________
7	View Selected Conditions.	From the Add/Remove Conditions page, view the section labeled Conditions – Selected List. Verify that the following conditions are added to the order: • Report in Person • Injurious or Vicious Habits • Work Faithfully	**These conditions will be used for Compliance.**
8	Save and activate order.	Select Save & Continue > Enter Details > Validate Details > then save, prepare to file and activate the order.	

Calendaring - Office Visit

#	Goal	Process	Response / Notes
1	Schedule an office visit to display on the supervising officer's calendar and the client's calendar and enter results.	From Caseload, search by SPN to locate the client you used in PASO > click on client's name > click the green Calendar tab > click on **Add New Event** > add an office visit dated 120 days in the past. Client failed to report as scheduled for a routine O.V. Click the **Enter Results** button. Set the Outcome to Absent and enter the Narrative (the Narrative will display in the casenote that is created). Click Next. From the Office Visit Results Summary page, **click Finish & Schedule Next**.	Note Division/Supervisor /Officer/ Client's Name and Date. This data will be used in Compliance. Division/Supervisor: ___________ ______________________________ Officer: ________________________ Client's Last Name/SPN: _______________________________ Date of Event: __________________
2	Schedule next office visit using Finish & Schedule Next.	Schedule a **future** office visit for this SPN to set the next scheduled contact date for next month. Change the Office Visit Date to schedule the event for next month. Add an Event Name, Start/End Time and Purpose of Office Visit.	Events created from the client or supervising officer's calendar will display on that officer's calendar. Scheduling a future office visit sets the next contact date for that client. The next office visit date displays on the Caseload page and on the violation report and case summary report.
3	Schedule an office visit to display on another officer's calendar. You are the supervisor who is taking care of cases from a No Officer Assigned caseload and need to set next office visit on another officer's calendar. File is in court being returned to the region and CLO needs to set next OV on a CSO's calendar.	Use Search Calendars to access the calendar for the officer who will be seeing the client > click Add New Event > schedule an office visit for a date next month > click Next. From the Caseload Search – Office Visit page, select the client from the appropriate caseload.	

Calendaring – Group Office Visit

#	Goal	Process	Response / Notes
1	Schedule a group office visit to display on your calendar and the clients' calendars.	Click the Calendar link in the left navigation tree or click the blue Calendar tab to access your calendar. Verify that your name displays above the calendar. Click **Add New Event** > schedule a group office visit for a date next month > click Next.	A group office visit cannot be scheduled from a supervisee's calendar. You have to start from an officer's calendar. When scheduling a group office visit to display on another officer's calendar, use Search Calendars to start from that officer's calendar.
2	Select clients for the group office visit and finish.	From the Caseload Search – Group Office Visit page, select clients. You can search by caseload or SPN to locate clients. Click **Create Group Office Visit** > enter event information > click Next > click Finish.	Authorized users can search for sex offenders by ZIP code or quadrant. Click the plus sign to the left of Selected Supervisee(s) to view attendees selected for the group office visit.
3	Add attendees to an existing group office visit.	From the Office Visits page, click the **Add Attendees** button. Search by caseload or SPN to locate clients > select clients > click **Add Selected** > click Finish.	Authorized users can search for sex offenders by ZIP code or quadrant.
4	Update a group office visit.	From the Office Visits page, click the **Update** button > modify event information > Next > Finish.	
5	Reschedule a group office visit.	From the Office Visits page, click the **Reschedule** button > change the date and/or time > Next > Finish.	Rescheduling a group office visit reschedules all clients associated to that event.
6	Enter results for a group office visit.	From the Office Visits page, click the checkbox next to clients with the same result > click the **Enter Results** button > select the Outcome that applies to all selected clients > enter the Narrative (the Narrative will display in the casenote that is created) > Next > Finish.	Results can be entered for all clients at once by clicking the select-all checkbox. The results must be the same for all clients selected.

7	Update results for a group office visit.	From the Office Visits page, click the radio button to select a client for whom results need to be updated > click the **Update Selected Results** button > update the record (the Narrative will display in the new casenote that is created) > Next > Finish.	Use this to fix results that were entered in error. The Update Selected Results button only displays when a record with results is selected.
8	Remove client from group office visit or delete event when last client is removed.	From the Office Visits page click on the Group Office Visit link for the appropriate client > click **Delete** to remove the client from the group office visit.	When the last client is removed from the scheduled group office visit, the group office visit is removed from the Calendar. Officers can remove clients from open group office visits (events for which no results have been entered). Supervisors can remove a client from closed office visits (events for which results have been entered).

Calendaring - Field Visit

#	Goal	Process	Response / Notes
1	Create a field visit itinerary.	View your Calendar by clicking the Calendar link in the left navigation tree or the blue Calendar tab > click **Add New Event** > select to create a field visit for a date for which you do not already have a field visit scheduled > Click Next > enter itinerary and click Next.	You will use one field visit itinerary per day.
2	Add field visit to your itinerary.	Search any officer's caseload to add a client to your field visit > click the radio button to the left of the name to select the client > click **Create Field Visit** and complete the workflow.	CSO Supervisor: ________________ Officer: ________________________ Client's Last Name: ______________________________ Date of Event: __________________
3	Add another client from a different officer's caseload to the field visit.	From the Field Visit Itinerary page click **Add Field Visit** > search a different officer's caseload > select a client to add and complete the workflow.	Officer: ________________________ Client's Last Name: ______________________________ Date of Event: __________________
4	View the itinerary.	From the Field Visit Itinerary page click the plus sign ⊞.	What do you click on to hide the itinerary? ______
5	Print the Itinerary.	From the Field Visit Itinerary page click the **Print Itinerary** button.	
6	Update the itinerary.	From the Field Visit Itinerary page click the Update link on the Itinerary Information line and complete that workflow. Update **In Field From** hours.	
7	Reschedule multiple field visits at once.	From the Field Visit Itinerary page, click the Reschedule Multiple Field Visits link on the Itinerary Information line. Use the check/uncheck all box to reschedule all clients > click Reschedule.	Can you select any combination of field visits to reschedule? ________

8	Reorder the itinerary.	From the Field Visit Itinerary page, click the **Reorder Itinerary** button > enter appropriate numbers in the # column > change the time as needed > Save & Continue.	What confirmation message displays: ______________________ ______________________________
9	Print Field Report Form.	From the Field Visit Itinerary page, click the radio button to the left of the record to select > click the **Print Field Report Form** button to view the Chronological Field Report. In training close the PDF document without printing.	
10	Enter results.	From the Field Visit Itinerary page, click the radio button to the left of the record to select a field visit > click **Enter Results** (the Narrative will display in the casenote that is created) > Next > Finish.	Besides Narrative, what other text field is required? ______________ You also have the option to Finish & Schedule Next.
11	Change results.	From the Field Visit Itinerary page, select a field visit for which results have been entered > click the **Update** button located at the bottom of the page > The Narrative will display in the casenote that is created > Next > Finish.	A casenote is created when results are entered or updated. Forthcoming - Casenotes created through the calendar will be saved in draft status.
12	View casenotes.	From the Field Visit Itinerary page, click the client's name > from the Details page click the Casenotes button.	Extra casenotes can be deleted if needed.

Program Referrals

#	Goal	Process	Response / Notes
1	Access the Program Referral List page.	From Caseload select to search by SPN to find the SPN you used in PASO. Click on client's name > click on the green **Program Referrals** tab.	SPN: _______________
2	Initiate new referrals.	Click **Initiate New Referral** > select case > Next > select the following three referral types: 1. Counseling / Family 2. Treatment / Mental Impairments 3. Treatment/Substance Abuse Click Save & Continue.	Multiple referrals can be created by selecting multiple referral types.
3	Sort the list of service providers by Region.	From the Initiate Program Referral - Select Service Provider page, locate the Region column, click the sort icons ▲▼	Use the down arrow to sort in descending order.
4	Filter the list of service providers by Region, Sex, Language or Contract type.	In the Filter Service Provider section, filter the list to see Service Providers for the North Region. In the Region field select North > click **Filter**. Click Refresh to remove the filter.	
5	Print Packet.	Use the check/uncheck all box to select all service providers then click the **Print Packet** button. Click Close in the pop-up window (no printing is necessary in training).	Selected referral types are listed at the top of the Service Provider page and corresponding numbers display to the right of each service provider name. Print Packet is also available from the Program Referral List page.
6	Return to the Program Referral List page.	Click the green Program Referrals tab to return to the Program Referral List page.	What date was added to the referral from the Initiate process? __________________ Change forthcoming: Allow entry/update of Referral Date.

7	Update referral information.	Click the radio button to select the Treatment / Substance Abuse referral. Click **Update** > Select Case > Next > Save & Continue.	Update will allow you to change any fields that displayed on the Initiate Referral workflow.
8	Select Service Provider.	From the Update Program Referral – Select Service Provider page, click the radio button to the left of **Unlimited Visions Aftercare** to indicate the Service Provider the client selected > Click Next.	Update Referral is used to select a Service Provider and add/change the Program location.
9	Select program location.	On the Update Program Referral – Select Program page, select **Multiple Locations** to indicate that the client will attend the program at one of many available locations > click Next then Finish. Schedule Date/Time is optional. We will use this feature when we print the appointment card to re-refer the client on an open referral.	⊗ This symbol displays to the right of a referral type when that referral type is not progressed (generally because a duplicate exists). ⚠ This symbol displays to the right of a program identifier when that program is under investigation.
10	Select a service provider and program location for each referral type.	Select the Counseling/Family referral, then click Update. Complete the steps to select a service provider and program location.	To report problems with a program, click the Report Issue icon ✉, enter information and click Submit.
11	Generate Form.	From the Program Referral List page, click the radio button to select the Counseling/Family referral > click Generate Form > click on the General Form link to display and complete the form, add the Program Name and Reason for Referral > click Next > click Finish.	**Reason for Referral** explains to the agency the reasons the client is referred.
12	View Program Referral Casenotes.	While generating the form, click the View Program Referral Casenotes link. When finished viewing the casenotes, click Close Window.	Which casenote subject is used for casenotes created within Program Referrals? ____________________________

13	Return to the Program Referral List	From the Form Confirmation page, click the **Referral List** button.	What other option can be used to return to the Program Referral List page? ___________________
14	Submit referral to enter the begin date.	Select the Treatment/Substance Abuse referral and click **Submit Referral** > Add today's date as the begin date, select a reason for placement, enter comments > Click Next > Click Finish. Repeat these steps to: Submit the Counseling/Family referral to indicate that the client started the program on August 12, 2010. Submit the Treatment/Mental Impairments referral to show that the client started the program yesterday.	**Program Begin Date cannot be a future date.** A referral with a begin date is an open referral.
15	Exit referral.	Select the open Treatment/Substance Abuse referral and click **Exit Referral** > enter the exit date > exit the referral due to a Program Violation > add a comment then complete the workflow. Exit the Counseling/Family referral due to a Program Violation.	
16	View exited referrals.	In the Filter Programs section, click the Exited box then click **Filter** to view exited referrals.	
17	Re-refer an open referral and print appointment card.	Select the Treatment/Mental Impairments open referral and click Re-Referral > Enter Scheduled Date and Time and Comments (use today's date) > click Next > click Print Appt > View the appointment card then click Close in pop-up window > click Finish.	Open referrals have a date in the Begin Date column. The Re-Referral button only displays when an open referral is selected.
18	View program details about a referral.	Select the Treatment/Mental Impairments referral and click **View** > from the Program Referral Details page, click on the link in the Identifier column to view the program details.	

19	Create a casenote for a referral.	From the Program Details page, click **Create Casenote** > click the + sign to view Program Referral Information > enter casenote text > Next > Finish.	The Create Casenote button can also be selected from the Program Referral List.
20	View casenotes for referral.	Select the referral you used to create the casenote. Click **View Casenotes.** When finished click Close Window.	Casenotes are automatically created when a referral is submitted, re-referred or exited and when forms are generated.
21	Remove entry (remove the program begin date and reason for placement).	Select a referral that has a begin date then click **Remove Entry** > click Finish. Remove the begin date on the Treatment / Mental Impairments referral.	The Remove Entry button only displays when an open referral is selected. Removing the begin date changes the referral status from open to initiated.
22	Remove exit (remove end date and reason for discharge).	Select a referral that has an end date then click **Remove Exit** > click Finish. Remove exit date on the Counseling/Family referral.	The Remove Exit button only displays when an exited referral is selected. Removing the end date changes the referral status from exited to open (submitted).

Compliance

#	Goal	Process	Response / Notes
1	Access Compliance.	From the Supervisee Details page, click the green Compliance tab. Access Supervisee Details in one of three ways: Supervisee Search > Search by SPN, NAME or CASE NUMBER > click View Profile. Caseload > Search by SPN > click on client's name. Caseload > Select client from officer's caseload > click on client's name.	Select the SPN you used in PASO. SPN: ________________
2	Filter conditions to view only conditions where Group 1 = Alcohol/Drugs.	Use the Filter Conditions section and the Filter button. Click on the blue arrow to display the Group 1 listing. Select Alcohol/Drugs > click **Filter**.	Use the "Show" field to select conditions that are compliant, non-compliant or both.
3	View Court Policies associated to conditions.	Click the plus sign to expand the list for the Injurious and Vicious Habits condition > click the plus sign to expand the list for Associated Court Policies > click on court policy name link to display policy literal > Close Window.	
4	View All.	In the Filter Conditions section > click **View All** to display all conditions.	
5	Add a noncompliance event.	Select Conditions by clicking in the box to the left of the condition name, which places a checkmark in the box. Select the Injurious Habits condition > select the **Set to Noncompliant** button > add the event occurrence date > in the Event Type field click on Positive UA > click Next. Enter any required data then click Next again. From the Set Conditions to Noncompliant – Casenote page, click the plus sign ⊞ to the left of Noncompliance Events section to review the noncompliance event	Multiple conditions can be set to noncompliant at the same time. For a Positive UA noncompliance event the Details field becomes required. Enter the name of the substance exactly as it appears in the lab report. Selecting to finish a casenote later saves the casenote in draft status.

		information. Add Casenote > Select to finish casenote later.	
6	View Casenotes.	Click the <u>View Casenotes</u> link for the Injurious Habits condition.	
7	Add a noncompliance event for an office visit created in Calendaring.	Select the Report in Person condition > Set to Noncompliant > Add Event using scheduled office visit date and time > Next > Add Casenotes > Finish.	On the Compliance – Select Conditions page, the noncompliance event count displays to the right of ______________________________.
8	Add a noncompliance event for the <u>**Work Faithfully**</u> condition due to failure to provide proof of employment.	Select Condition > Set to Noncompliant > Add Event > Add Casenote > Select to finish casenote later.	
9	Create Condition Casenote.	Select all fee conditions > Select the **Create Condition Casenote** button > create a casenote that will be associated to all listed conditions > click finish.	Multiple conditions can be selected when creating condition casenotes. View Condition Casenotes using the Casenotes button.
10	Filter conditions to view only noncompliant conditions.	In the **Show** field, click the radio button beside the red X, and then click Filter.	Noncompliant conditions are listed first under Supervisee Conditions.
11	Resolve noncompliance.	Select the Work Faithfully Condition > Select the **Resolve Noncompliance** button > select Issue Resolved as Compliance Reason > Next > add a casenote to complete the workflow.	What is the noncompliance event count for this condition? _____ An officer can select to resolve a noncompliance event.
12	Decrement the noncompliance event count.	Locate the Work Faithfully condition > Select the <u>Decrement</u> link on the line with the condition> click the radio button to select the Noncompliance Event > Next > Finish.	Does the noncompliance event count now display as zero or blank? _____________ CSO Supervisors can decrement the noncompliance event count.

Violation Report

#	Goal	Process	Response / Notes
1	Access Case History.	Use the SPN you used in PASO. From Caseload, search by SPN to locate the client > Submit > click on a client's name > click the Cases tab.	SPN: __________________ Violation and Case Summary reports are accessed from the Case History page.
2	Create violation report.	From the Case History page, select the active case > click **Violation Reports** > click **Create Violation Report** and click the <u>Update</u> link in each section to complete each section.	Spell check will be added to each comment field. Currently the Comment fields allow a maximum of 500 characters; the field length will be increased to 3500 characters.
3	Update the Reporting Section.	Click the <u>Update</u> link in the Reporting History section.	Reporting information is populated from noncompliance events created for conditions where Group 1 = Reporting. When the last F2F > 90 days then the last known address from PTY will also display in this section. Event type displays incorrectly in the Test regions.
4	Remove selected record.	Access the Employment History section by clicking the <u>Update</u> link. Select an employment record > click the **Remove Selected** button.	Multiple records can be selected and removed at one time.
5	Refresh to remove manually entered data and restore source records.	Click the **Refresh Employment** button > Next > Finish.	Refresh restores source data that displays automatically. Changes made in the section are lost. All employment records created during the order supervision period will display with the most recent employment listed first.
6	Update Previous Court	Add information to show that a Motion	Violation and Case Summary

	Activity.	was filed and set aside. Access the previous Court Activity section by clicking the <u>Update</u> link. Add Motion > enter information > Next > Finish.	reports filed during the supervision period will automatically display. Which *font style* is used to show that information was added manually? ___________________
7	Update Treatment Issues.	Access the Treatment Issues section by clicking the <u>Update</u> link. Remove all referrals except the Treatment/Substance Abuse referral.	Which button is used to remove listed referrals? ______________________
8	View Positive Urinalysis data.	Access the Positive Urinalysis section by clicking the <u>Update</u> link.	Positive Urinalysis is populated with noncompliance events created for either of the following Event Types in Compliance: **Positive UA** **Positive UA – Non-Prescribed RX** Which field from the noncompliance event page is used to populate the Substance field on the violation report? ___________________
9	Return to the Violation Report List.	From the Update Violation Report page, click the **Violation Reports List** button at the bottom of the page.	Notice the report is saved in draft status.
10	View the Report.	Click the **View** button.	Update links do not display on the View Details page.
11	View Casenotes.	Click the Supervisee tab > click the **Casenotes** button to view the Casenote Journal. Click Back twice to return to the Violation Report page.	
12	Submit the Report for Approval.	From the Violation Reports List page > click Update > Submit For Approval.	This sends a task to the officer's supervisor.

Tasks

Assignment Tasks

#	Goal	Process	Response / Notes
1	Search Tasks by SPN and accept and complete a submitted task.	From the Task Search page, click the Advanced Search link > in the **Tasklist Type** field select SPN > Enter the SPN for the amended order you activated > note that the Status defaults to Submitted > click **Submit**. Accept and complete the task created for the assigned officer.	To select more than one status, such as Accepted and Submitted, hold down the Ctrl key and click on multiple status listings. What is the Task Subject for the task created when an amended order is activated? __________ ___________________________
2	Search for tasks assigned to another supervisor or officer.	From the Task Search page > click the Advanced Search link > in the Supervisor field select the supervisor's name > click Submit.	Use Advanced Search to locate and progress tasks assigned to another supervisor or officer within your program unit.
3	Return Assignment.	The **Return Assignment** link displays on the Assign Supervisee to Officer – Caseload Summary page. Use this link to return an assignment task to your intake workgroup. In the Return Reason field, indicate why the assignment is being returned and where to reassign it.	CSO Supervisors use Return Assignment to have the casefile/assignment sent to a different program unit.
4	View Help on Task Assignment.	Click Home > Click the link to view JIMS2 Manuals – Click the CSCD Diagrams link and Click the Assigning Cases to an Officer link.	

Caseload Searches

#	Goal	Process	Response / Notes
1	Inquire on a caseload.	From Caseload, search for an officer's caseload.	
2	Transfer to Casenotes from Caseload and then back to Caseload.	Click the Casenotes icon to the left of the client's name. From Casenotes, click the Back button or click the Caseload link in the left navigation tree.	
3	Determine the date of the next office visit for a client.	Check the column labeled Next OV.	Next OV scheduled: ___________
4	Determine the date of the last face-to-face visit.	Check the column labeled Last F2F.	For a field visit this is the last complete visit where the Method of Contact was Direct Contact.
5	Resort the list by SPN, by Jail Status, by Warrant Status and then by Days left.	Use the sort icons in each column ▲▼ (J = Jail Status, W = Warrant Status). Resort list by Warrant Status in descending order to see clients with open warrants (Y).	Days left is calculated from the supervision end data and displays in red when it is 30 days or less.
6	Access the last page of the caseload.	In the Page field, type a page number then click the Page link.	
7	Filter the caseload by cases assigned to a particular court.	In the Search By Caseload section, enter a number in the Court field > click **View Caseload**.	
8	Filter the caseload by clients in a particular ZIP Code.	In the Search By Caseload section, enter a number in the Zip Code field > click **View Caseload**.	The client's address is available on the Supervisee Details page.
9	View Workload from Caseload page.	In the Search by Caseload section, click the **Workload** button.	This replaces APWI – the Workload Formula Inquiry Screen.

Caseload Reports

#	Goal	Process	Response / Notes
1	Access a list of all office visits, field visits or other events on the displayed officer's calendar.	Use Search by Caseload to locate the officer's caseload. In the Current Caseload section, click the <u>OV/FV/OTH</u> link > select the category > select the date range > click Submit.	The date range defaults to ______________________ ________ If events for your clients are on another officer's calendar, first inquire on that officer's caseload, and then click the OV/FV/OTH link to view a report for that officer's calendar.
2	Access a list of cases assigned to and removed from a caseload.	From a caseload, use the <u>In & Out Activity</u> link in the Current Caseload section.	(Fixes are forthcoming to improve this report.)
3	Access a list of clients referred to a particular service provider. (Use the service provider noted above.)	From a caseload, click the <u>Program Referral Provider</u> link > enter the name of the service provider > click Submit > select provider and click View Caseload.	You can enter the first few letters of the provider name and then * (the wildcard character).
4	Return to Caseload.	Click Cancel or click Caseload in the left navigation tree.	
5	Access a list of clients referred to a particular program. (Use the program noted above.)	From a caseload, click the <u>Program Referral Provider</u> link > select to Search By Program > enter program name > click Submit > select listing and click View Caseload. You can also search by program group. Search for Program Group = Treatment.	You can enter the first few letters of the program name and then * (the wildcard character). Example: TEX*
6	View the program referral details.	From the Caseload by Program Referral Provider page, select client > click View Program Referral.	You can also select to Show Exited Programs for the selected client. What link would you use to show exited program referrals? ________________________

Level of Supervision (LOS)

Current Process:

- Add – Use to update the current LOS.
- Correct current LOS - Fix error in current LOS by adding a new LOS then delete the former record.
- Correct history record – use to correct an LOS history record that is in error.

#	Goal	Process	Response / Notes
1	Access LOS History.	Access Supervisee Details > in the LOS section of the page, click View History.	LOS is recorded at the time a new order is activated and assigned to a caseload.
2	Correct LOS history record.	From the LOS History page, select the history record that displays in error then click the **Correct** button.	
3	Create a future LOS.	Supervisee Details > Add > Set future effective date.	The update takes place immediately; however it shows a "future effective date."

Forthcoming:
Allow correction of current level of supervision without having to add a record and delete the inaccurate record.

Casenotes

#	Goal	Process	Response / Notes
1	Search Casenotes.	Select Casenotes from the left navigation menu. Search using the SPN that you used to create the violation report.	
2	Create a casenote.	From the Casenotes List page click the **Create Casenote** button. Create a casenote using any SPN. To expand the casenote literal field, place your cursor over the expand icon at the bottom right of the field, click and drag the field open. 	This expand feature is also available in the Field Visit Narrative field where results are entered.
3	Copy and paste casenote.	Click the **Home** link in the left navigation tree > Click the <u>CSCD FAQs</u> link > click on the link labeled <u>I am having problems printing casenotes</u>. Follow the steps to create a new casenote using Notepad to copy and paste an existing casenote.	

Forthcoming: Display LOS on Casenote header.

Access answers to frequently asked questions (FAQs) --
http://www.hctx.net/CmpDocuments/70/manuals/cscd_faq.htm#faq5